APPROVING EVA REQUISITIONS

Approving an eVA Requisition

Most eVA requests require approvals. Approvals are automatically assigned based on the:

- User's profile,
- Agency's business rules, and
- Dollar amount of the requisition/eForm.

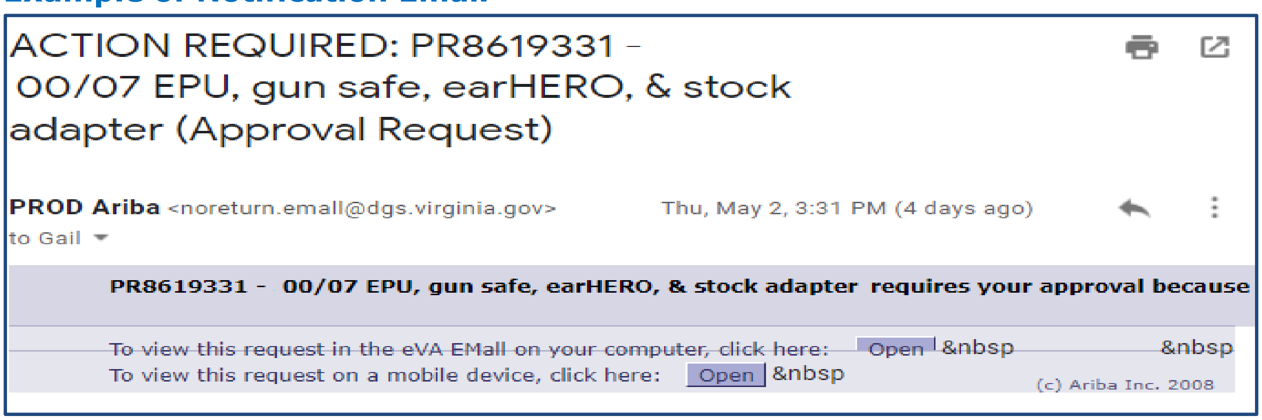
Approvals are usually handled by users who have been assigned an approval role. Any user who is a member of that group can approve the transaction. Depending on your agency/entity setup, you might encounter requisitions/eForms that display a specific individual name and not a role.

NOTE: Clicking the role name on the Approval Flow tab will allow you to view the names of the assigned individuals.

A final 'print' approval displays at the end of the workflow on requisitions when the supplier cannot receive orders electronically. The purpose of this approval is to remind the requisition requester that the order must be printed and faxed/mailed to the supplier. *Caution: If an approver with the 'No Refire workflow' role chooses a print vendor over the original electronic vendor, and does not refire the workflow, the final print approver will not display.*

Approvers are notified by email when a transaction is awaiting their approval.

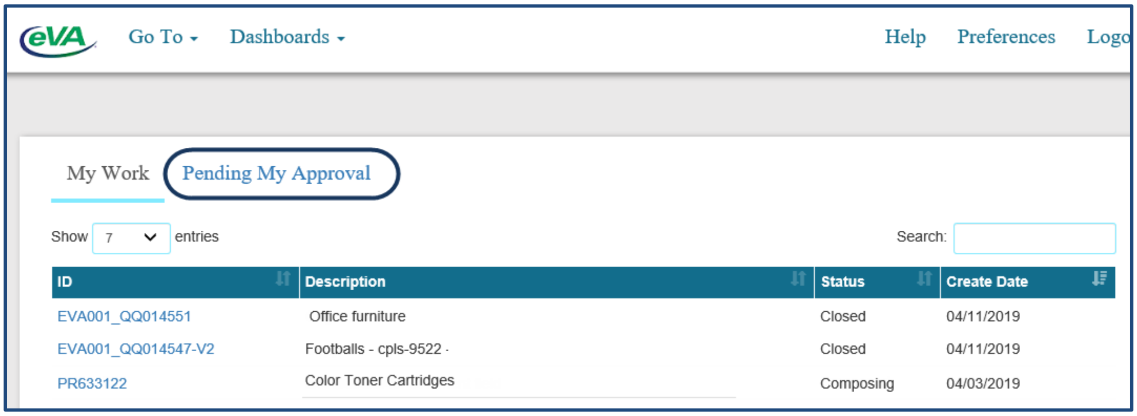
Example of Notification Email



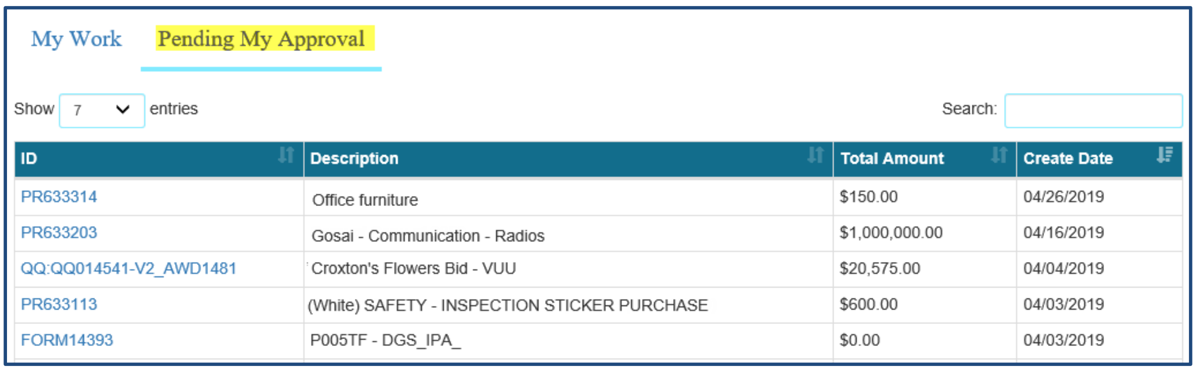
Accessing Items awaiting your Approval

Once logged into eVA, you will see a link on the Portal called 'Pending My Approval', as shown on next screen.

When clicking ‘Pending My Approval’, you can locate and access a particular transaction immediately. *NOTE: Items awaiting approval inside an agency ‘Queue’ do not appear on this screen. (Queue Management setup)*



When above link is selected, transactions awaiting approval appear.



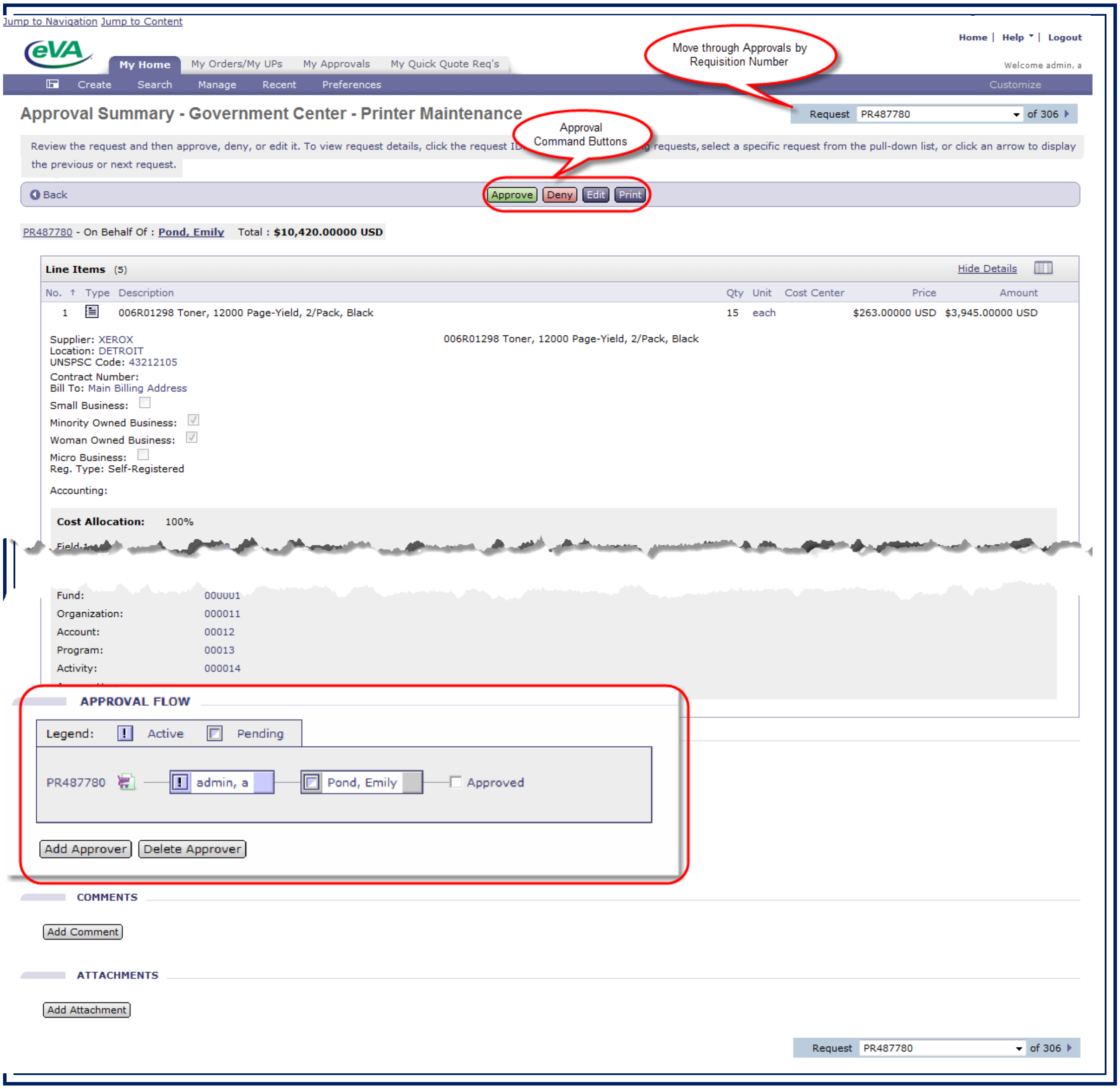
Approvals Accessed via My Home or My Approvals Tabs

You can access the approvable directly from the ‘To Do’ window, or from the ‘My Approvals’ tab, as shown below.

When the ‘Approve’ link is chosen, or if you click an ID from the ‘Pending My

Approval' on the Portal screen, the **APPROVAL SUMMARY** screen appears. This view contains most information you need to make an approval decision for that requisition, including a detailed list of line items ordered, the approval flow for the requisition, and any comments the preparer has added.

Approval Summary Screen



Approving Requisitions (New and Changed)

Before you approve a requisition, review it carefully. Small details can become big problems when mistakes go unnoticed.

Although the **APPROVAL SUMMARY** screen displays most details, it does not show everything. If you want to review all transaction details (e.g. Shipping details, line attachments, etc.), click the Requisition Number link that appears above the first line item.

Requisition Number Links to Summary Tab for Complete Details

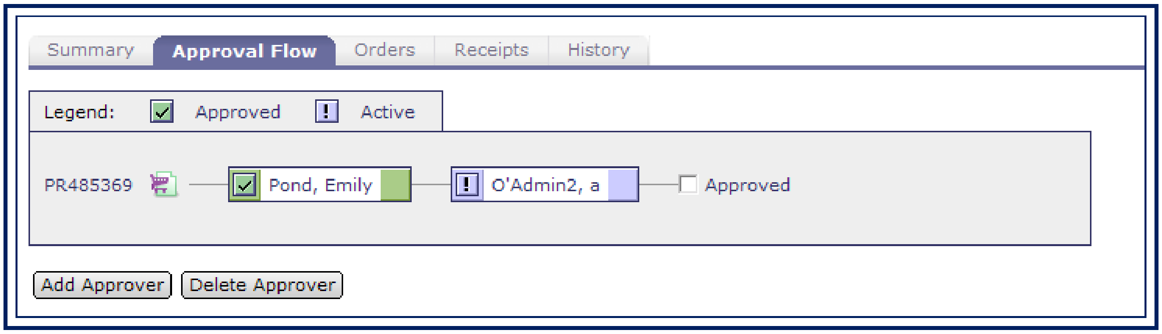
List of key details to review:

Approval Review Guide

Detail to Review	Impact on Approval
Account Codes	Account Code fields might have been auto-populated with default values from the user's BSO profile. • All requisitions should be evaluated to ensure they carry the correct Account codes.
Supplier	• Is the vendor correct? No requisition should be processed with a 'Vendor to be Determined' appearing in the Supplier field.
Dollar values at line level and Total Cost	• Evaluate the total dollar amount of the requisition. Negative line item amounts are permitted by the system but may not be permitted by the agency.
Bill To & Ship To	• Verify that the addresses are correct for each line item.
Comments	Comments might provide specific details about what is being purchased and why. • Verify the details and whether the comments will be included on the purchase order. • If they are to be included on the purchase order, the **Visible to Supplier** checkbox must be selected. • Also review comments inserted by prior approvers. **CAUTION!** Approvers cannot their own comments/attachments nor can they remove the end user's. If necessary, deny the transaction and request the end user to resubmit after they delete the offending item.
Attachments	Attachments also might provide specific details about what is being purchased and why. • Verify the details and whether the attachment(s) will be included on the purchase order. • If they are to be included on the purchase order, the **Visible to Supplier** checkbox must be selected.
Approval Flow	• Verify the approval flow includes all required parties. • Additional approvers may be added, if necessary.
Shipping Details	• If the 'See Line Item Shipping Details' checkbox on the Summary screen is checked, verify details at the line level.

When you have completed your review, click **Approve** or **Deny**. The requisition will disappear from your **To Do** list. The preparer will be able to see your approval on the **Approval Flow** tab of the **REQUISITION DETAILS** screen.

Approval Flow Tab Tracks Requisition Approval Status



Editing a Submitted Requisition

Approvers with Edit permission can change a requisition/eForm and re-submit the revised version. An **Edit** button is visible next to the **Approve** and **Deny** buttons.

Clicking the **Edit** button opens the transaction in edit mode so changes can be made. When finished, clicking the **Save** button saves the changes. The approver must still click the Approve button when finished.

NOTE: Editing the requisition causes the approval flow to reset according to the new values on the requisition UNLESS the approver has the 'eVA-NoRefireWorkflow_None' role and chooses not to check the "Re-fire approval…" checkbox that appears on the below Summary screen.

,

If the approver has the eVA-NoReapprovalwithApproverEdit' role, the workflow will refire regardless if a change is made to quantity or price.

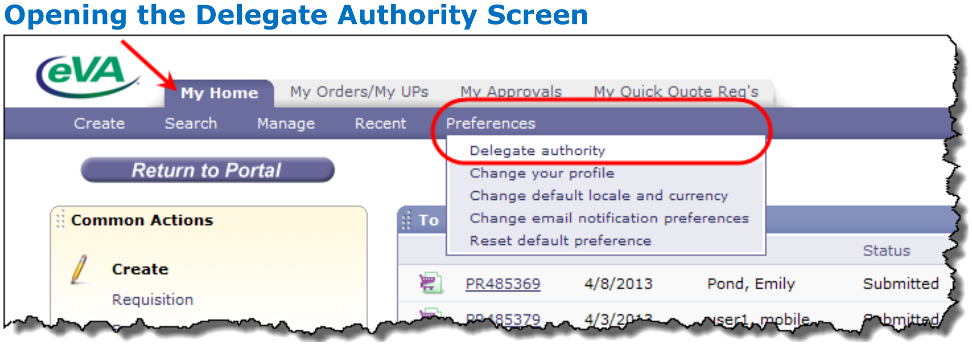
Delegating Approval Authority

If you are unable to access eVA long enough to cause purchase delays (e.g. on vacation), you can temporarily delegate your approval authority to another user for a specified period of time.

Step 1: Delegate

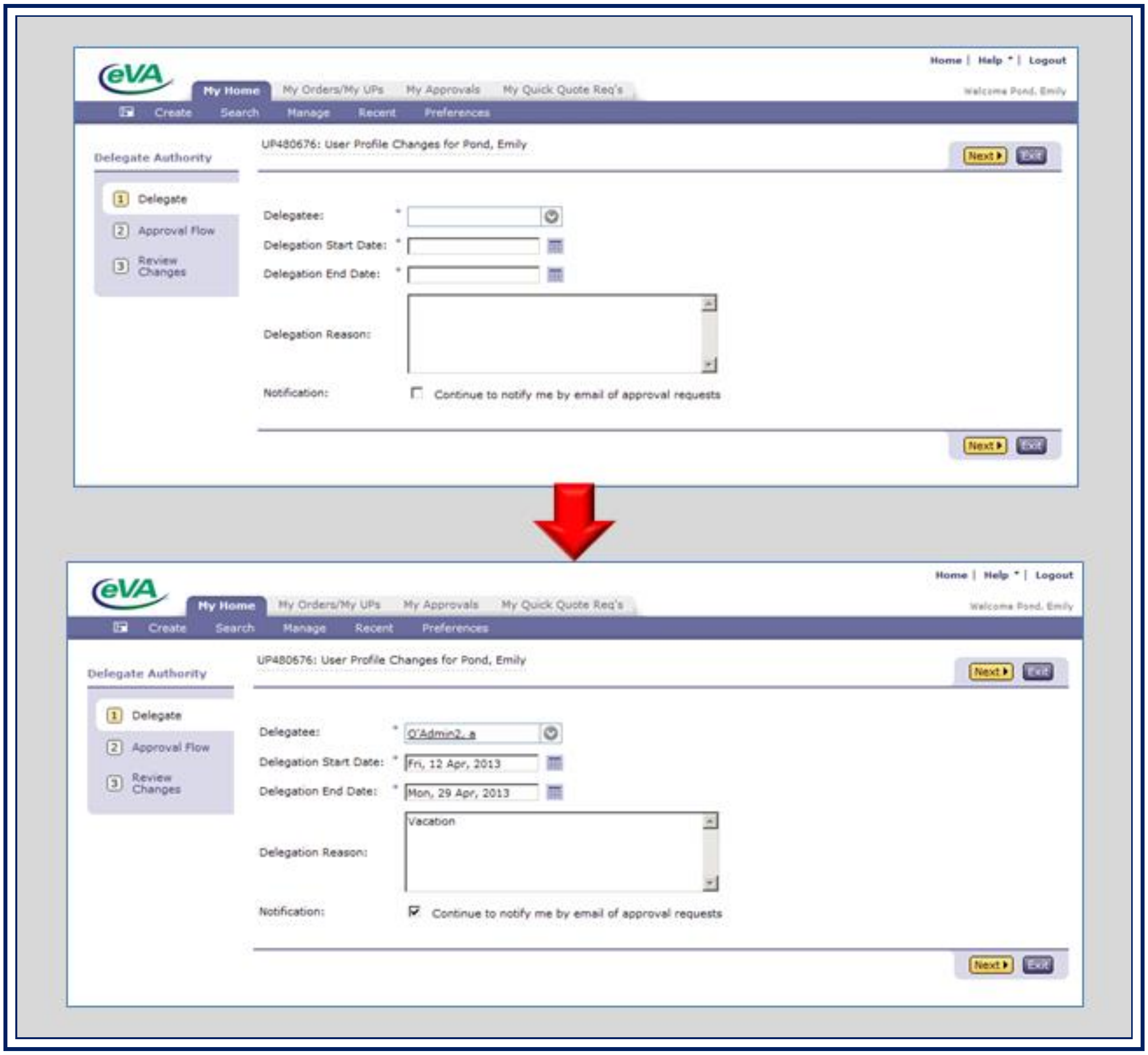
To delegate approval authority, go to the **My Home** tab on the **DASHBOARD** and select *Delegate authority* from the **Preferences** menu.

Opening the Delegate Authority Screen



Insert the required information on the Delegate Authority screen. If the name of the person to whom you want to delegate authority does not appear in the **Delegatee:** drop-down list, select **Search for more…**

Completing Delegation of Authority



Use the calendar icons to set the **Delegation Start Date** and the **Delegation End Date**. The Delegation Start Date is the first date your delegate can act as your approver; the Delegation End Date is the date your delegation of authority expires. The delegation begins and ends at midnight on the specified dates, except when the delegation start date is the current date. In that case, the delegation is effective immediately.

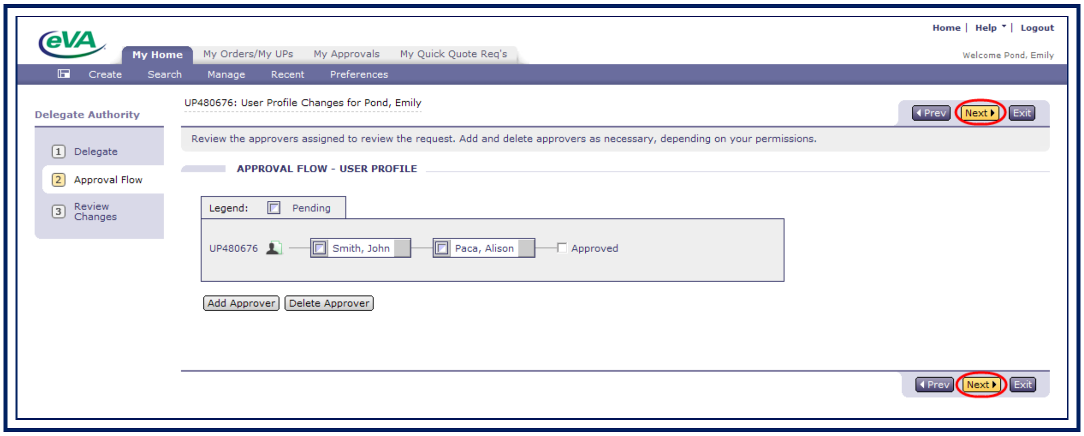
You may choose to enter a **Delegation Reason**. If you want to continue to receive approval notification emails while you are away, click the **Notification** checkbox; you and your delegate will both receive the notifications. When finished, click **Next**.

When you submit a Delegation of Approval, a User Profile (UP) document will appear in the My Documents list on your eVA dashboard.

Step 2: Approval Flow

The default approval flow assigned to your user profile is displayed on this screen. Click **Next** when you are ready to proceed to the next step.

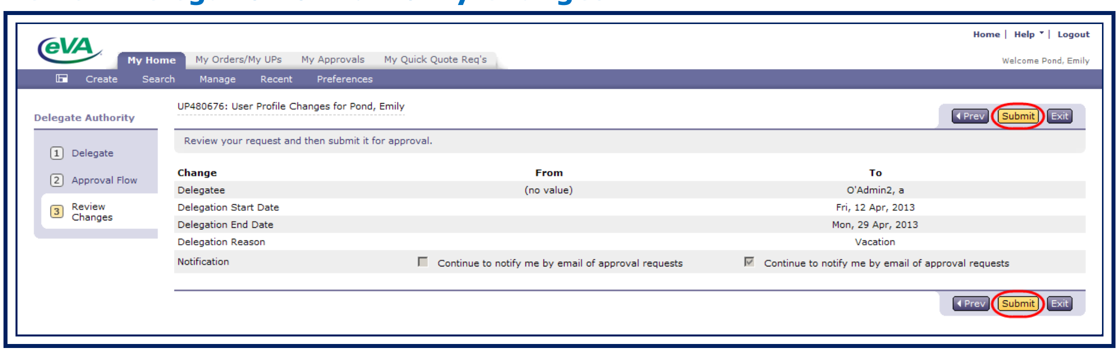
Approval Flow Screen



Step 3: Review Changes

The **Review Changes** screen provides an opportunity to take a second look before you submit your changes.

Review Delegation of Authority Changes

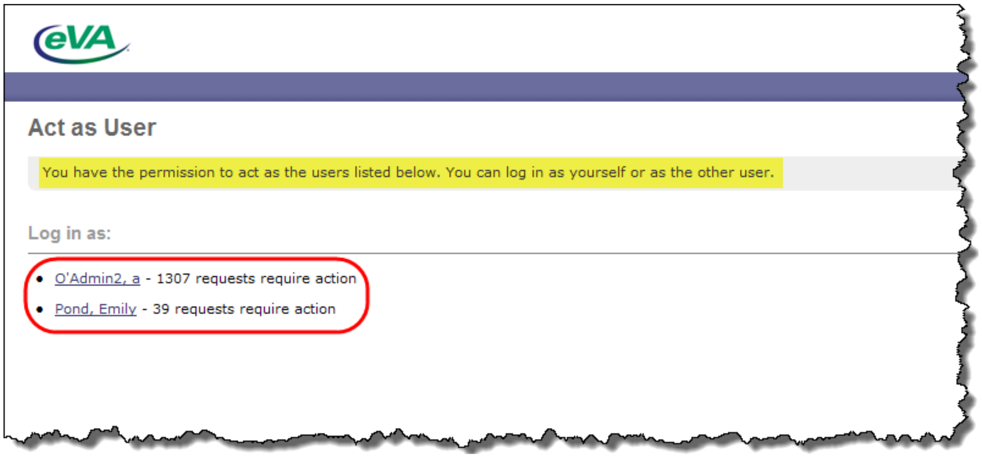


When satisfied that your changes are correct, click **Submit** to activate your delegation of authority.

"Act as User" Screen

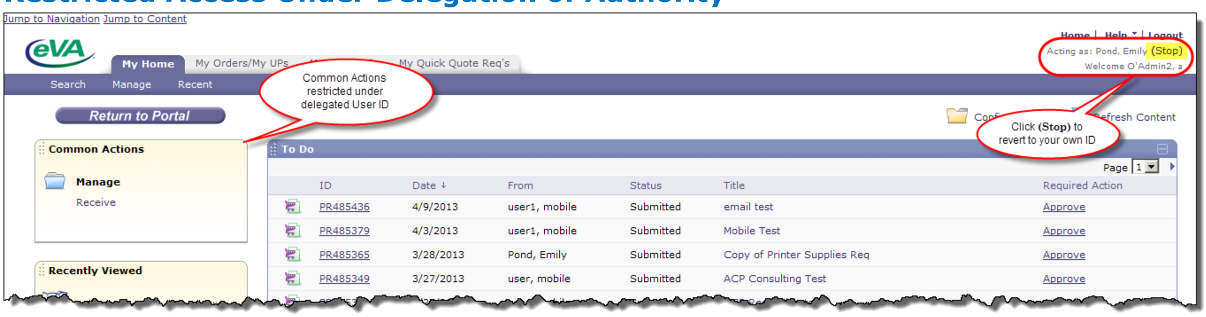
During the delegation period, your delegated approver will see the **Act as User** screen when accessing the eMall/eForm link. This screen prompts the delegate to select which User ID to work under for that session. The delegate must choose whether to act under his own name for regular eMall functions, or to act as an approver on your behalf (or 'on behalf of' another delegator, if applicable).

Act as User Screen Prompts ID Selection



When a user is acting under a delegation of authority, access to eMall functions is limited. You will NOT be able to create transactions nor do receiving under that ID.

Restricted Access Under Delegation of Authority



A delegate can exit from the delegated User ID and resume using their own User ID by simply clicking the (Stop) link in the upper right corner of the screen. eVA will restore full access under the delegate's personal User ID.

Active Delegation of Authority

If you log on before your delegation of approval authority expires, you will be notified via the **Active Delegation of Authority** screen. Choose whether to continue using the delegation of authority or Stop using the delegation of authority by clicking the appropriate link. Your choice is effective immediately.